I-SMART Web Infrastructure for Treatment Services

Iowa Service Manage and Reporting Tool

PLACEMENT SCREENING MODULE

Placement Screening

- ✓ Placement Screening Profile
- ✓ Financial/Household
- ✓ Youth Info
- ✓ Substance Abuse
- ✓ Legal
- ✓ ASAM
- ✓ Diagnosis
- ✓ Recommended Level of Care
- ✓ Program Enrollment

IDPH Iowa Department of Public Health

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FEi Systems

Placement Screening OWI

Placement Screening OWI Profile

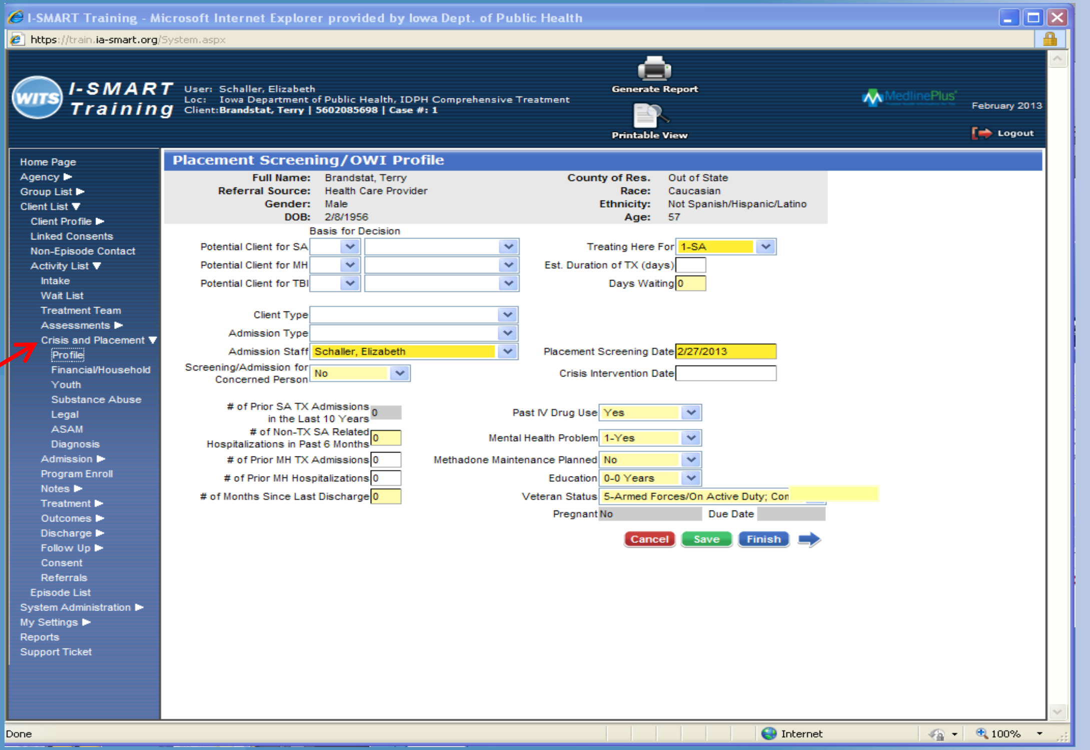
1. **Entry Steps: Client Profile, Intake,**

2. You have completed the **Client Profile** and **Intake**. Go to **Client List** and use the **Activity List** hyperlink to select your client.

   Note: If you accidentally select the wrong client, use the menu at the far left to return to **Client List**.

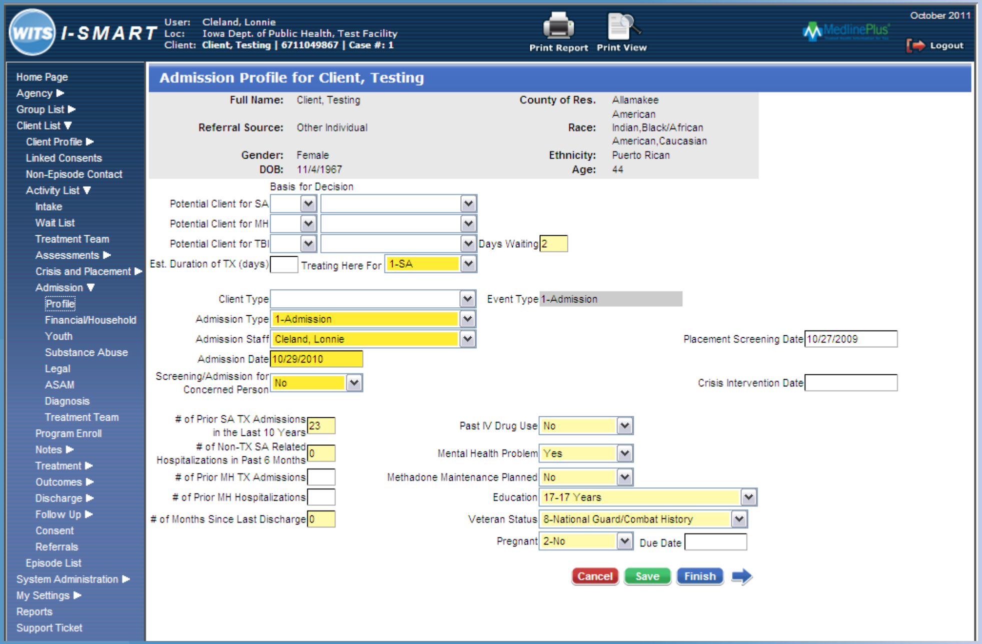
3. Select **Crisis and Placement** in the **Activity List** left-hand sub-menu. You will be placed in the **Placement Screening OWI Profile**, the first of 9 screens. Though the **Program Enrollment** screen is not physically a part of the **Placement Screening** module, we consider it necessary for the Placement Screening process.

4. **Read-Only Fields**: **Full Name, Referral Source, Gender, DOB, County of Residence, Race, Ethnicity,** and **Age.** Most of this data was entered via the **Client Profile.** To correct inaccuracies, return to the **Client Profile.**



Placement Screening OWI

Admission Profile



5. **Problem Area:** One of the objectives in the placement screening is to assess the clients need for treatment and the appropriate level of care. You can see that many fields are available, but not all are required by either the system or Iowa. For example, the first three questions refer to whether the client might potentially have a substance abuse (SA), mental health (MH) or traumatic brain injury (TBI) problem.

6. The **Event Type** field will always be "Placement Screening".

7. Fill in the appropriate placemant screening date.

5. The **Admission Staff** is pre-populated based on the user's name.

Placement Screening OWI

Admission Profile

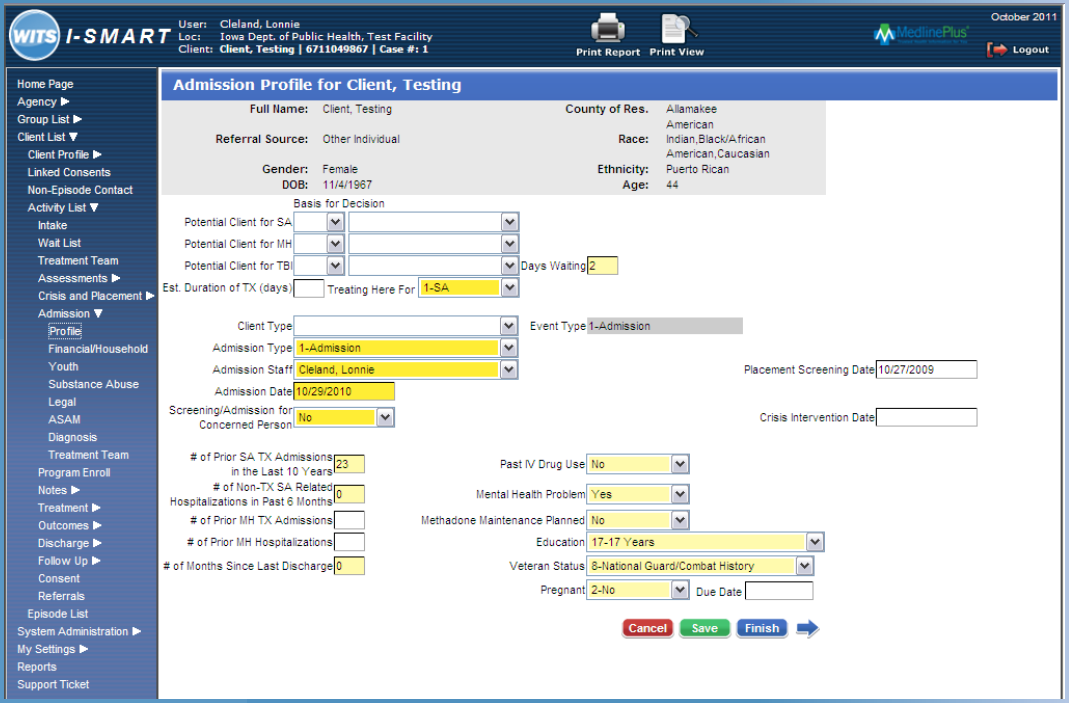
9. **Days Waiting**: The number of days elapsed between when the date of first contact and the date of the placement screening.

10. **Historical Information:** The questions at the bottom of the screen are used to collect the number of times the client has been treated in various settings as well as other historical information that may change over time.

11. Click **Next** to proceed to **Financial** and **Household** information screen.

12. Click **Next** to proceed to **Financial** and **Household** information screen.

13. Note: All required fields are highlighted in yellow color. The status of the module in the **Activity List** will remain **In Progress** until all required fields are entered. You cannot enter services until the **Intake** and **Admission** Modules are completed.



Placement Screening OWI

Financial, Household, Youth

15. **Financial Info:** This section captures some basic information about the client's financial situation.

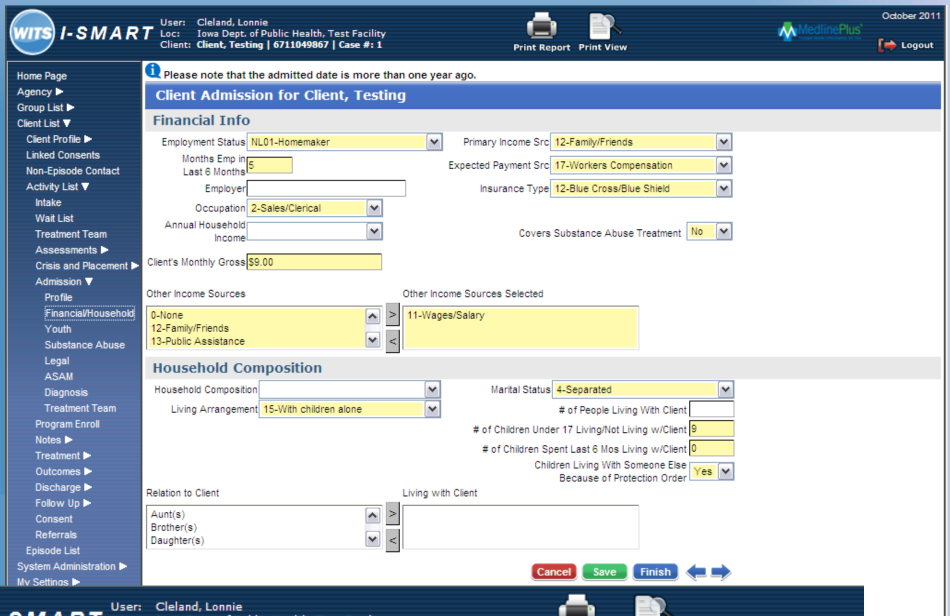
16. The information for income from SSI/SSDI is under the **Other Income Sources** which allows you to pick multiple options.

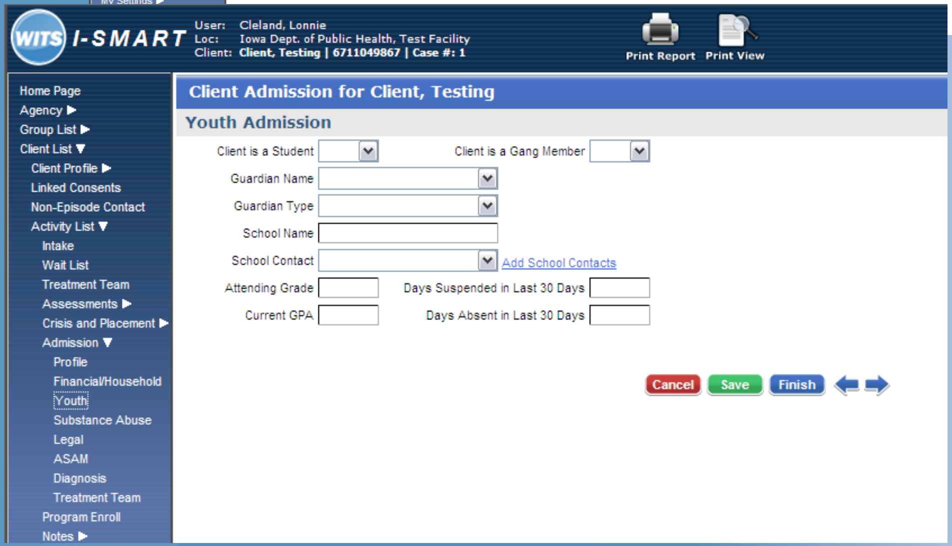
17. **Household Composition**: These questions help to establish the living arrangements of the client at time of admission. More detailed questions about their living circumstance may be captured in the TAP.

18. Click **Next** to proceed to Youth.

19. **Youth Admission:** This section is only required if the client is under 18 years old. Use the **Add Contact** hyperlink to add the details of the **School Contact** in the **Client Profile>Contacts** if not already listed.

20. Click **Next** to proceed to **Substance Abuse**.





Placement Screening OWI

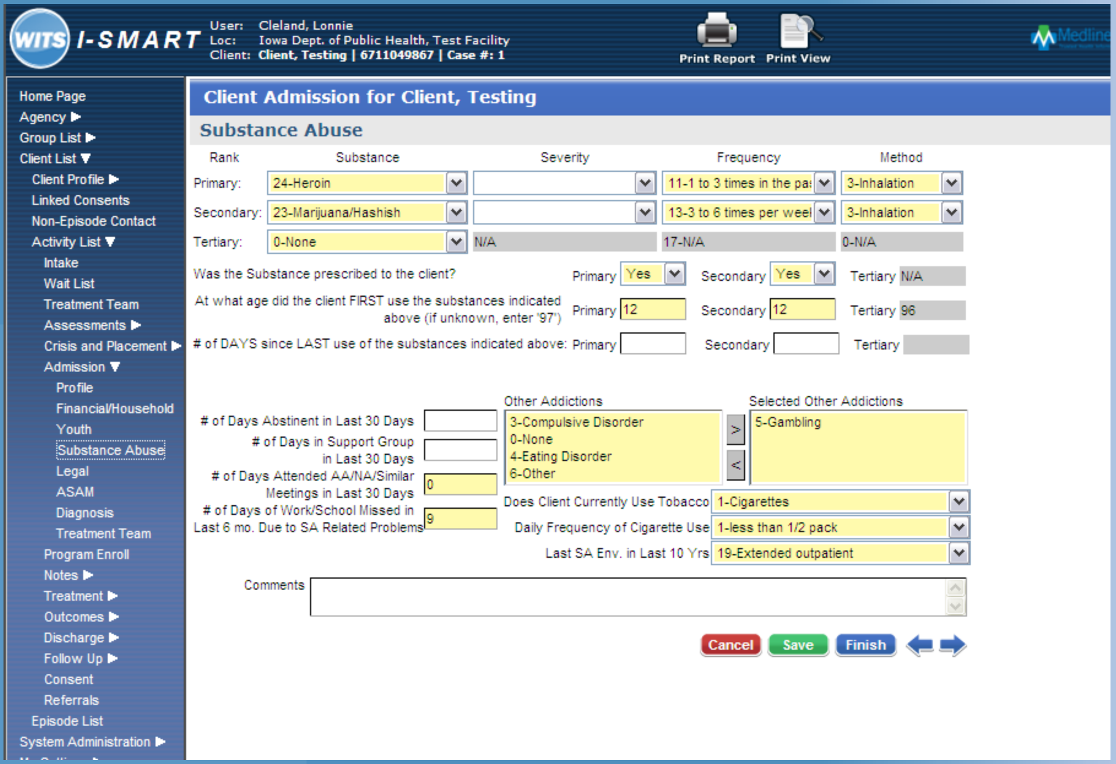
Substance Abuse

21. **Substance Abuse:** This section should be completed for all substance abuse clients, but not for concerned other admissions. Once you select a **Primary Substance**, you must complete the associated **Frequency** and **Method** drop downs. Follow the same process for **Secondary** and T**ertiary** substances if appropriate.
Note: You cannot have a **Secondary** substance without a **Primary**.

21. **Use**: You must also complete the **First Use** and question if a substance has been indicated in the upper section of this form.

22. **Other Addictions:** You may use the mover box to document additional addictions.

23. Click **Next** to proceed to **Legal**.

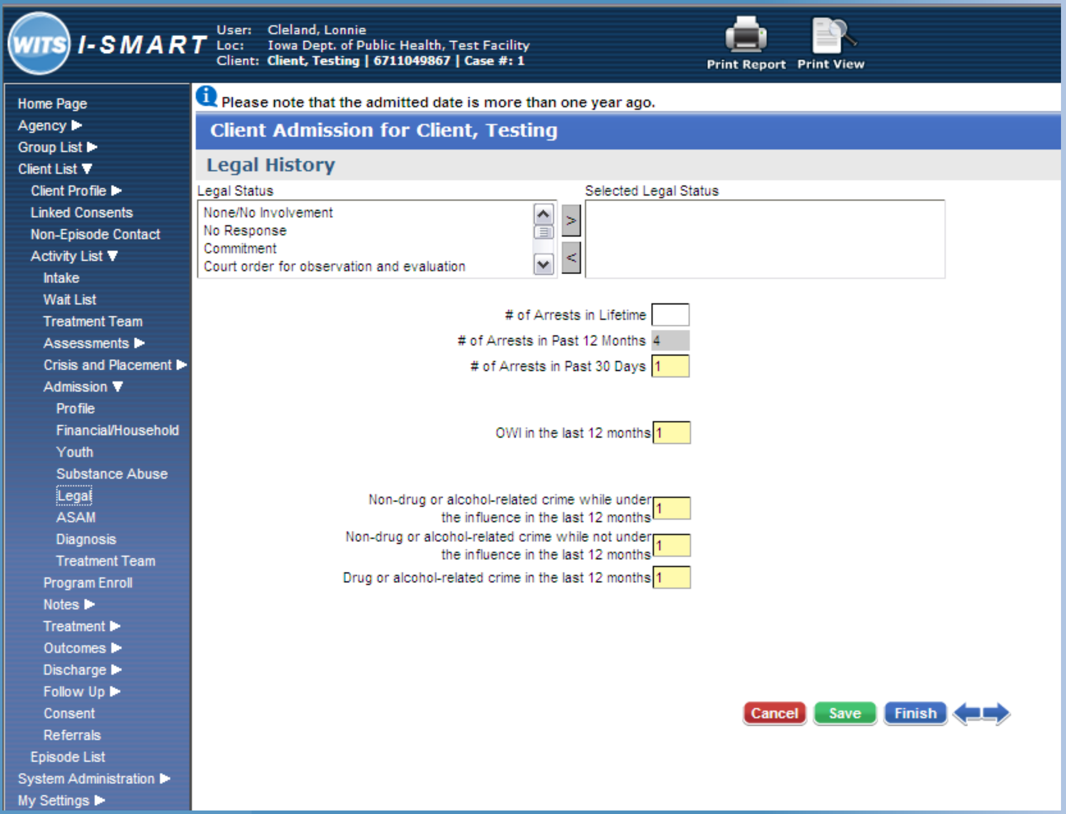


Placement Screening OWI

Legal History

27. **Legal History:** Indicate the number of incidences as appropriate to the question by typing in a number in the appropriate text box.

28. Click **Next** to proceed to the **ASAM** screen.



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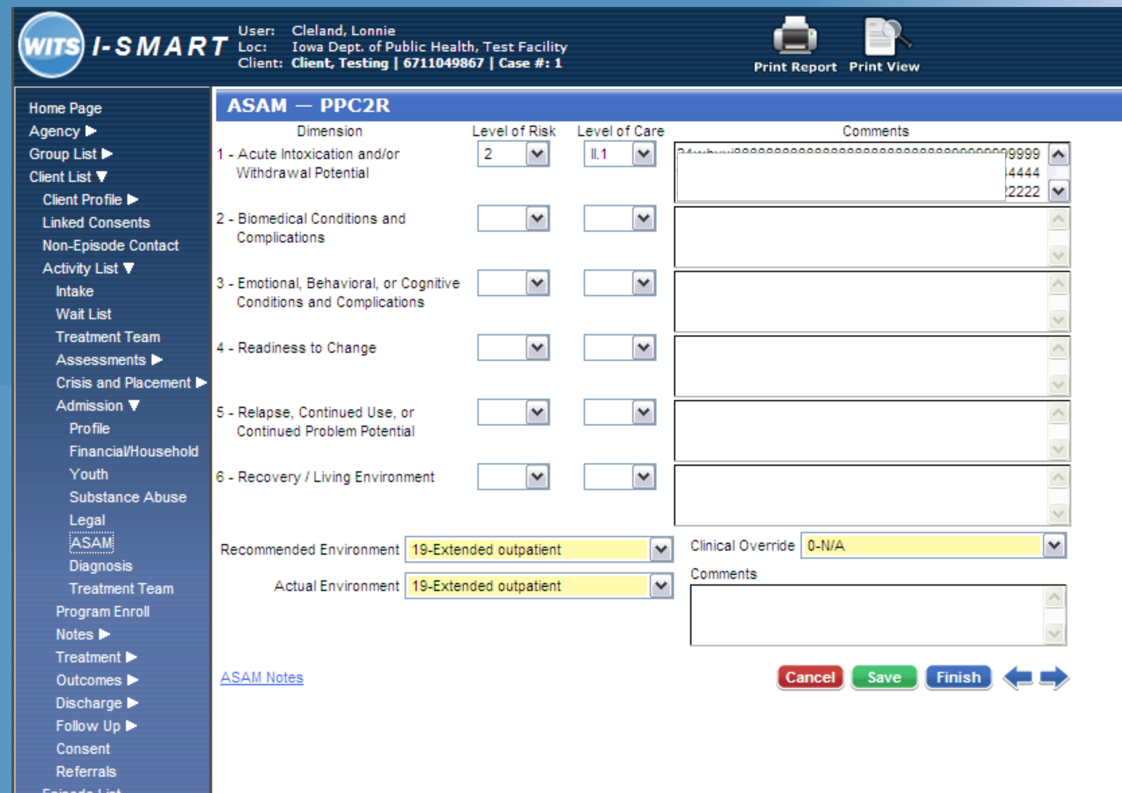
ASAM

29. **ASAM:** Select the appropriate level of care for each ASAM dimension and provide necessary comments for your selection. Select the appropriate level of care in the drop down menu. Leave the Actual Environment and Clinical override fields blank as this is only an assessment.

30. Click **Next** to proceed to **Diagnosis**.



Placement Screening OWI

Client Diagnosis

31. **Select Primary Diagnosis:** If you know the diagnostic code, you can choose the appropriate diagnosis by clicking the drop down field. Then hold down the number of the code to scroll to the proper selection. For example, the client's diagnosis is 303.90. Simply click on the field and hold the 3 key down until the desired selection scrolls into view. Select **Secondary** and **Tertiary** diagnoses in this same manner.

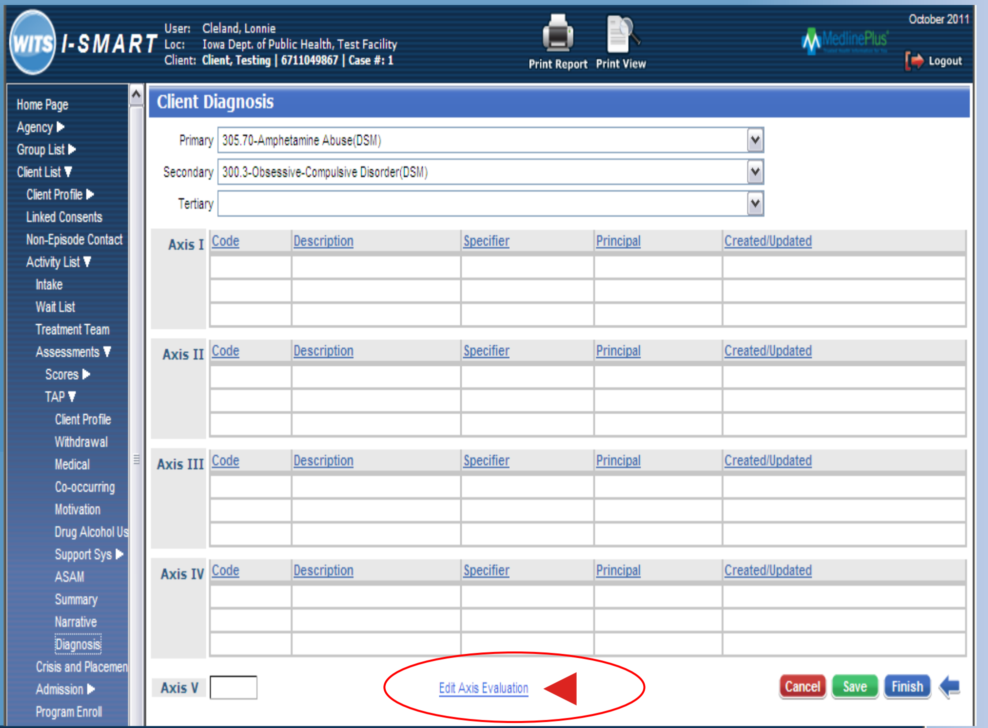
- **Note**: If a diagnosis was entered in the Crisis or Placement Screening preceding this admission, it will not be brought forward to populate this screen.

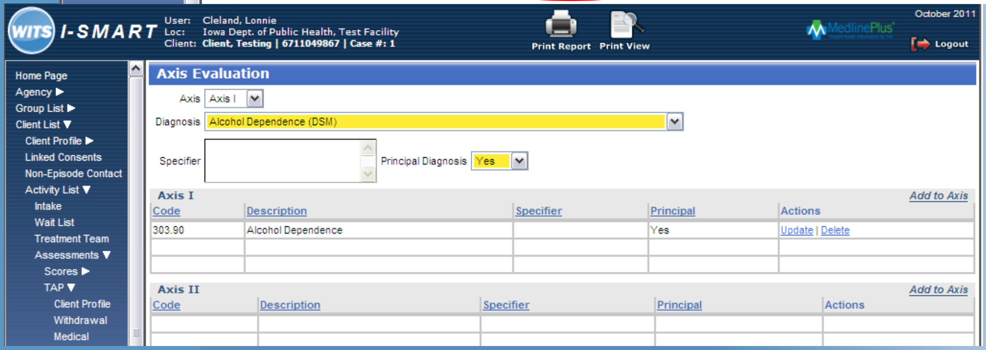
32. In this same manner, enter the appropriate **Priority (Primary, Secondary, or Tertiary)** for each diagnosis you enter.

33. To add diagnostic codes to the Axes, click the **<u>Edit Axis Evaluation</u>** hyperlink. This will open the Axis Evaluation screen. You can then choose the appropriate diagnosis to add to the axis. For example, Choosing Alcohol Dependence and clicking the **<u>Add to Axis</u>** hyperlink in the Axis I box adds this diagnosis to Axis I.

34. In this same way, you can continue adding to either Axis I or the other Axes as desired.

35. **Finish** will take you back to the Client Diagnosis screen with diagnoses added to each axis.





Admission

Treatment Team

Getting here: Click on either the main menu item **Tx Team** or in **Admission/Treatment Team.** This screen allows you to record all the members of the treatment team. The treatment team may be composed of staff and non-staff persons.
Note: If you entered this information in the Admission module it will pre-populate here.

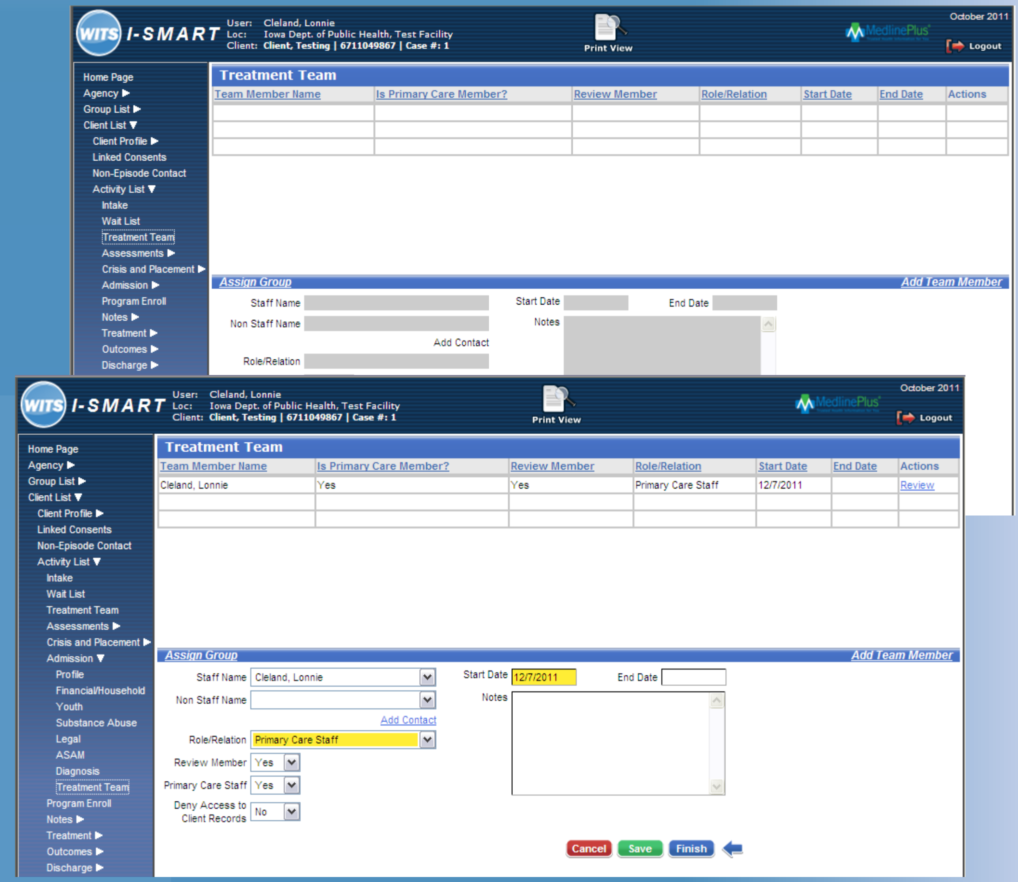
2. When you enter this screen, the lower half is grayed-out. Click on the link for **Add Team Member** to add one treatment team member at a time.

3. Select either a **Staff** or **Non-staff Name,** their **Role/Relation,** and **Start Date.**

4. **Review Member**: Indicates whether the team member is a member of the **Treatment Review** team. Any member of the **Treatment Review** team will have a signature line on the client's **Treatment Plan.**

5. Select Yes or No for the **Primary Care Staff** field to indicate if the person you are adding to the team is the client's primary staff member. Each client can have only one **Primary Care** Staff.
Note: Selecting staff as **Primary Care Staff** allows the user to search for clients for whom a specific counselor is **Primary Care Staff** by using the search function on the **Client Search** screen.

6. Select Yes or No for the **Deny Access to Client Records**. You should usually select No so that this member of the treatment team will be able to view the client's record.



TREATMENT TEAM

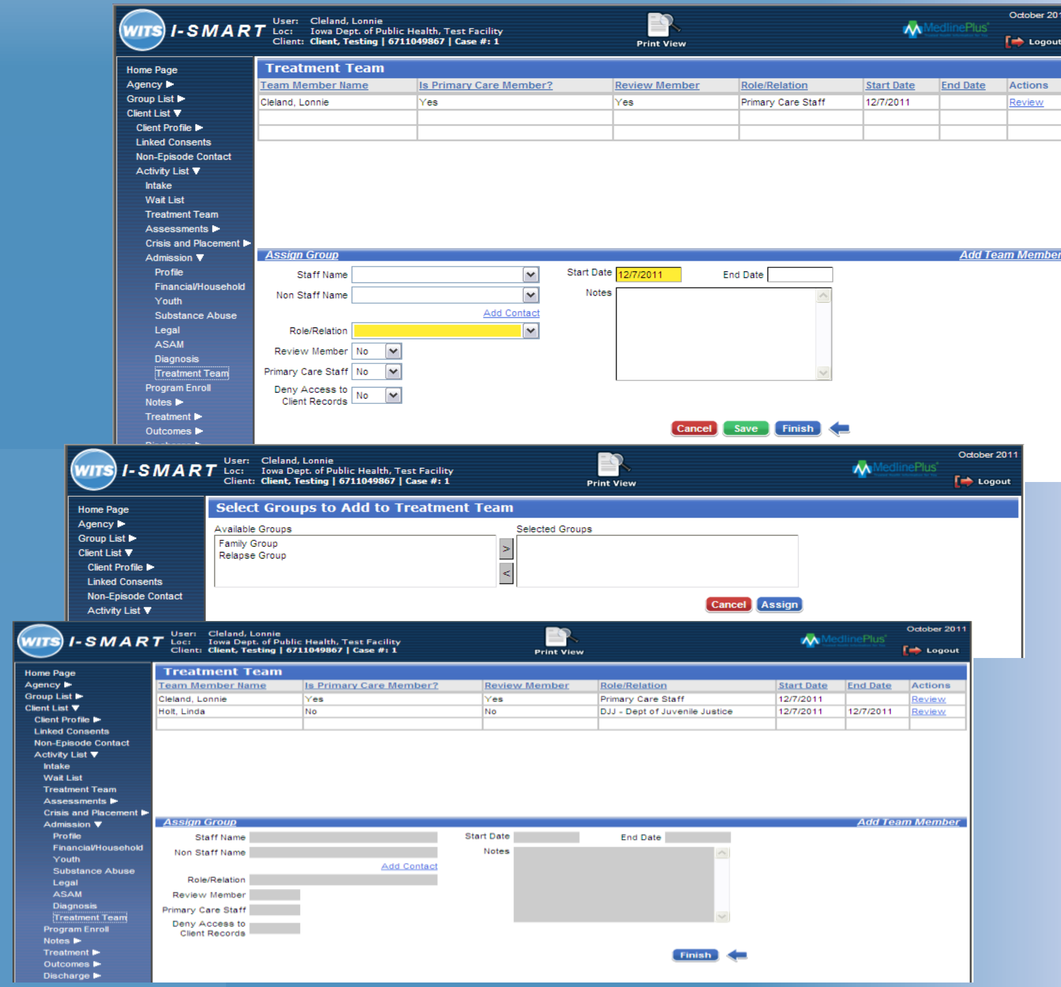
8. **Note:** The drop-down list for non-staff member comes from the contact list setup in the Client Profile. If you do not see the name of the person you are trying to add to the team, you need to first add that person to **Collateral Contacts**.

9. **Click** on the link for **Add Contacts** which will take you to the **Collateral Contacts** screen. You can add the details there, save, and then come back here to add the person to the team.

10. To add a group of people to a client's treatment team at one time, click the **Assign Group** hyperlink. The groups were created in the Agency module.

11. Click the desired group from the **Available Groups** list and click the right pointing arrow to select the group. Then click **Assign**, this will add all of the individuals from the group to the **Treatment Team**.

12. Click **Finish** to return to the **Activity List** Screen.



Admission

Program Enrollment

This module allows you to record the client's enrollment in and transition through multiple programs within a facility.

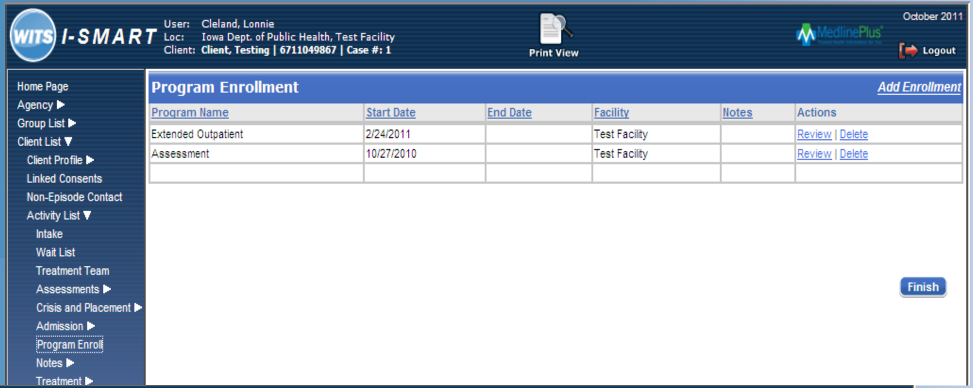
36. Click the **Add Enrollment** hyperlink to enroll the client in a new program. You may also use the **Review** hyperlink to change previously entered enrollment information. **Delete** will delete a program enrollment unless it is associated with an completed **Encounter**.

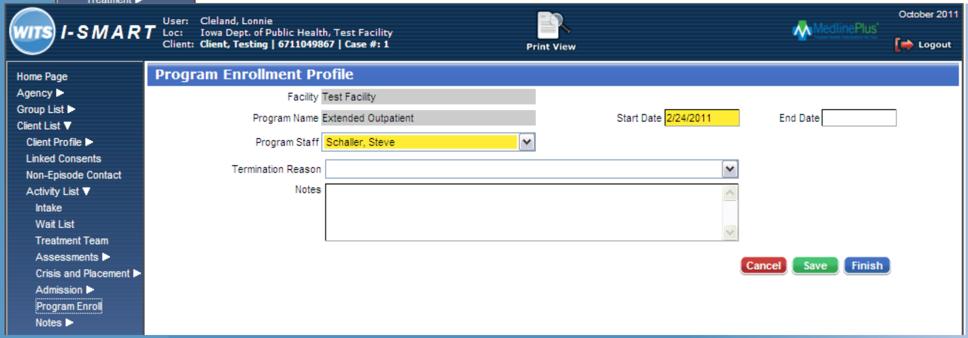
37. Select the appropriate facility which will then populate the appropriate Programs under **Program Name**.

38. Complete all other information as needed.
Note: Clients can be enrolled in only one level of care at a time. Each program is associated with a level of care at the time the program is set up in the Agency/Facility module. Client can be enrolled in more than one program at a time if the programs are in the same level of care.

36. Click **Save** to save the data you just entered in the table at the top.

37. Click on **Add Enrollment** each time you want to enroll the client in a new program and follow the above steps.
Note: If a client moves from one program to another, you should unenroll her/him from the first program and then enroll the client in the next. (See next page)





Admission

Program Enrollment

41. Unenrolling and changing programs : If a client is ending treatment in a program or transferring from one program in one level of care to a different program in either the same or different level of care the process is the same.

42. **Review** will open the Program Enrollment screen for editing.

43. Change **Currently Enrolled** to **No**.

44. Complete the **Tx Completed**, **End Date** and **Termination Reason** fields. Add Notes if desired.

45. Click **Save** to save the data you just entered in the table at the top.

46. Click on **Add Enrollment** each time you want to enroll the client in a new program and follow the above steps.